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TRAVEL MANITOBA MARKETING SUMMARY 1984-85

Manitoba
Business
Development
and Tourism

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INTRODUCTION

This Marketing Summary copy of Travel Manitoba's Marketing Plan for 1984/85 is intended to provide you a broad overview of our analyses, and our strategies and programs for the coming year.

It is a "summary" in the most literal sense of the word; it sets forth our conclusions and objectives statements, but without incorporating all of the extensive and considerable data and details that support them.

The Marketing Plan itself, from which these summarized highlights derive, is the third in an ongoing series of annual assessment and activity rationales which have been prepared each year since 1982.

These Plans result from the assembly and examination of various research programs and from further informational inputs obtained through the resources of the Federal and Provincial governments, and from the assistance and cooperation of the Tourism Industry Association of Manitoba.

A copy of the complete Marketing Plan itself can be made available to you upon request, should you wish to inform yourself more fully and completely on any of the areas of specific interest contained in this summary.

I ENVIRONMENTAL ANALYSIS.

A. SOCIETAL TRENDS

Economic conditions and societal trends will favour travel market growth, although cost consciousness and distance factor from markets will constrain Manitoba's market share.

B. TRAVEL INDUSTRY TRENDS

Neutral to positive opportunities for growth exist, but with some concerns regarding Manitoba's product capabilities.

C. MARKET OVERVIEW

1. Primary markets.
Manitoba, Saskatchewan, Northwest Ontario, North Dakota, and Minnesota — provide the most attractive growth opportunities for Manitoba in 1984/85.

2. Travel purpose.
Pleasure travel is the principal motivation for trips in Manitoba among residents and for United States primary markets. In the primary Canadian markets VFR (visiting friends and relatives), along with pleasure travel, becomes more important.

3. Primary market profile: Canadian.
The present primary Canadian pleasure travel market to Manitoba is young, of an average-to-better income, and bound for Manitoba destination areas.
DESCRIPTION OF MANITOBA'S CURRENT PLEASURE VISITORS FROM CANADIAN PRIMARY MARKETS.
MANITOBA: Younger adults with average income and education on day or weekend trips to private cottages, friends/relatives and campgrounds. Primarily destined to Eastern and Interlake regions.
SASKATCHEWAN: Young and mid-aged adults with somewhat higher incomes and average education on weekends and one-week trips staying with friends/relatives, in campgrounds and commercial accommodations. Primarily destined to Winnipeg, Parkland, and to a lesser extent to the North.
NORTHWEST ONTARIO: Young to mid-aged persons with high school education and average incomes on day/weekend and one-week trips staying with friends/relatives, and destined to Winnipeg.
ALBERTA: Young adults with higher incomes and better education on trips of one or more weeks, staying with friends/relatives and in commercial accommodations, and destined to Winnipeg, the Southwest, and Parkland.

4. Primary market profile: United States.
The primary U.S. travel market to Manitoba is young to mid-aged adults with better than average incomes and education. Sixty-five to seventy percent of their trips are in the spring-summer quarters.
DESCRIPTION OF MANITOBA'S CURRENT PLEASURE VISITORS FROM UNITED STATES PRIMARY MARKETS.
NORTH DAKOTA: Young to mid-aged adults with better income and who have better than average education. They are on day/weekend trips using commercial accommodations or campgrounds, and are destined to Winnipeg, Westman/Parkland, and the North. There is a significant fall market.
MINNESOTA: Young to mid-aged adults with better incomes and post-high school education. They are on day/weekend trips and destined to Winnipeg, Eastman and North, and use commercial accommodation or campgrounds.

5. Pleasure travel: motives.
The pleasure travel market consists of large mass segments motivated by sightseeing and outdoor recreation activities, while narrower specialty market visitors are motivated by more particular products and specific activities.

6. Market share: Canadian primary.
In Canadian primary markets Manitoba's competitive strength is in the in-province and Northwest Ontario markets; our principal competition in primary Canadian markets is from home-province attractions, from neighbouring provinces and non-Canadian destinations. Manitoba appears to compete best among lower income markets, and for trips of one week or less duration.

7. Market share: United States primary.
Opportunity exists for increasing Manitoba's share of the Minnesota travel market to Canada, particularly among younger, higher income households.

8. Specialty markets.
With our resource strengths and current plant in place, Manitoba is not capturing an adequate share of the U.S. sports angling market; we lose far too much of this market to Ontario, even in our primary markets. Previous strategies appear to be insufficient, and there is certainly potential for substantial growth.

D. PRODUCT PROFILE

1. Regional analysis.
Current strengths lie in the raw resource base and man-made events/attractions in selected regions. There are product weaknesses in the accommodation, service, human resources sectors in rural Manitoba.

2. Competitive analysis.
Manitoba products can compete best in the

in-province, Northwest Ontario and North Dakota markets. Selected regional product strengths are competitive in Saskatchewan, Minnesota, Alberta and more distant secondary/tertiary markets, generally on a specialty market basis.

3. Component analysis.
Travel Manitoba can best and most economically influence the tourism industry by concentrating its resources on man-made attractions and events, accommodation facilities and marketing systems.

4. Development strengths.
Primary development opportunities exist in the areas of man-made resources, accommodation, human resources and industry organization.

5. Development opportunities.
Primary development opportunities exist within specific regions as identified in Destination Manitoba areas: most regions require plant upgrading and hospitality training.

E. ECONOMICS

1. Balance of payments.
Manitoba records a deficit on travel accounts principally because of large deficits with other provinces and the U.S.

2. Tourism impacts.
Marketing and development strategies which maximize tourist expenditures on service and retail sectors will have the greatest economic impact and benefit.

II TRAVEL MANITOBA ROLE.

Travel Manitoba views itself in a role of leadership to:

1. Provide leadership and support in shaping the future development of the tourism industry in Manitoba.

2. Represent and advocate tourism interests in the development of government policies.

3. Develop annual strategic and operating plans that meet provincial policy goals.

4. Initiate marketing and development programs designed to stimulate and support the planned and orderly growth of the tourism industry.

5. Facilitate and support the initiatives undertaken by the private sector consistent with development strategy and resources.

III TRAVEL MANITOBA OBJECTIVE.

The long-term objective for Travel Manitoba is to establish a stable rate of growth in tourism income, at least equal to growth in the Provincial Domestic Product.

IV STRATEGIC PRIORITIES.

Travel Manitoba has identified seven strategic priorities for 1984-85.

1. Undertake a year-round program of promotion and travel information services that is directed toward primary growth markets for pleasure travel, while maintaining secondary and tertiary market strengths in specialty segments. The strategy will be directed to achieving 3% growth in travel expenditures, to the priority of increasing Manitoba's share of longer duration trips, the priority placed on provincial parks/destination areas and Manitoba's culture in program content, and will address the objective of improving regional economic balance.

2. Generate increased federal marketing and development resources towards Manitoba's tourism objectives.

3. Generate increased private sector promotion/marketing efforts which are complementary to and support Travel Manitoba's programs.

4. Undertake programs for facilitating the upgrading of existing,and the development of new, tourist attractions with broad market appeal within Manitoba destination areas and which reflect the product priority of parks and culture.

5. Implement programs for upgrading and developing tourist accommodation facilities offering opportunities for all identified markets and which are directed by the priorities of destination areas and regional balance.

6. Undertake programs for upgrading the level of skilled employment and for developing entrepreneurship in the tourism industry including programs targeted to disadvantaged groups.

7. Develop a system of communications and ongoing liaison which will provide for public and industry input into tourism marketing and development programs and policies.

V MARKETING STRATEGIES 1984/85

A. ALL MARKETS.

In our mass and specialty markets Travel Manitoba will continue to use our existing theme in 1984/85 and will strengthen the positive message of the theme through improved music bed, lyrics and scripts. Travel Manitoba will continue to address the market profiles, the product priorities, and express Manitoba as a community reflecting an image of hospitality, diversity, stability and opportunity. At every appropriate opportunity, co-operative delivery with industry will be utilized.

B. MANITOBA

High priority. Growth target 2.2%

Launch a major continuous and all-season marketing campaign designed to motivate mini-vacations (1-3 days) and short duration vacations (4-7 days) through emphasis on regional destination areas, value vacation opportunities, outdoor recreation, and rural/Winnipeg sightseeing. This campaign will reflect capacity constraints.

C. CANADIAN PRIMARY

1. Saskatchewan

Medium priority. Growth target 2.1%

Implement a moderate marketing campaign for summer and shoulder seasons motivating short duration and mini-vacations through product specific urban/rural sightseeing, also capitalizing on large V.F.R. market.

2. Northwest Ontario

Low priority. Growth target 12.4%

Implement a low-to-moderate product specific summer and shoulder season marketing campaign highlighting rural/urban attractions and events with primary emphasis on mini-vacations and also targeted on large V.F.R. market.

3. Alberta

Very low priority.

Maintain current level of travel with minimal market investment by responding to requests and undertaking selective marketing activities directed to specialty market segments.

D. UNITED STATES PRIMARY

1. Minnesota

High priority. Growth target 19.0%

Implement a major summer and shoulder season image and product specific marketing campaign designed to emphasize product diversity, competitive value and strengths in relation to competing destinations. Re-examine potential for a Minneapolis office in terms of travel trade benefits.

2. North Dakota

Medium priority. Growth target 3.0%

Launch a moderate-high campaign with summer priority and increased emphasis on off-peak seasons highlighting sightseeing Winnipeg/rural, outdoor recreation and horse racing.

E. CANADIAN SECONDARY

Quebec, B.C., remainder of Ontario; implement a low-moderate marketing program in selected venues directed only towards specialty markets (meeting and convention, group travel, naturalist self-education).

F. UNITED STATES SECONDARY

Illinois, Michigan, Wisconsin, Iowa, Nebraska, South Dakota; undertake selective marketing activities directed to specialty market segments (motorcoach, angling, meeting and convention travel, naturalist self-education, adventure markets).

G. UNITED STATES TERTIARY

Remainder of U.S.; support selected travel influencer efforts directed to specialty market segments (motorcoach, angling, meeting and convention travel, naturalist self-education, adventure).

H. OVERSEAS

Respond to travel influencer initiatives on a selective basis directed towards specialty markets (adventure, meeting and convention travel, naturalist self-education) and V.F.R. component.

J. SUMMARY — MARKETING STRATEGIES 1984/85

Product Emphasis	Markets Man.	Sask.	N.W. Ontario	N. Dakota	Minnesota
Outdoor recreation	X			X	X
Rural sightseeing	X	X	X	X	X
Winnipeg sightseeing	X	X		X	X
Resorts	X	X		X	X
Urban attractions			X		
Urban events			X		
Rural events			X		
V.F.R.		X			
Horse racing				X	X
Cultural events					X
Angling					X
Shopping					X
Gambling					X

ROLES AND OBJECTIVES

a) Departmental Policy Objectives

- Meet basic social and economic needs and rights of all, before luxury demands.
- Improve distribution of income.
- Provide meaningful productive work in improved work environment.
- Increase integration of disadvantaged groups into social and productive life.
- Improve regional balance.
- Increase participation in the workplace and public decision making.
- Environmental preservation.

VI ADVERTISING

MANITOBA ADVERTISING CAMPAIGN SCHEDULE AND CAMPAIGN LENGTH IN ALL MARKETS

Market	Manitoba	N.W. Ont.	Sask.	P.A.T.A. N.D.&N.W.M.	Southern Minnesota	Angling	Travel Trade	Meetings & Incentives
Campaign Length	Apr-Oct	Apr-Nov	Apr-Aug	Apr-Sept	Apr-July	Jan-Sept	All Year	All Year
Media	Selection and weighting of media in all market areas							
TV	Apr-July	Apr-June	Apr-June	Apr-June	Apr-July			
Radio	June-Sept	June-Dec				Apr-Sept		
Insert	May	April	April	April	April			
Print	June-Oct	June-Oct	June-Aug	May-Oct	May-July			
Outdoor		Apr-June			Apr-June			
*Mail Promotions			Apr-May	Apr-May				
Magazines						June +	Apr-Jan	
M&IT Specialty						1985 Jan/Feb Mar/Apr		Apr-Jan

*Mail Promotions will be backed up by radio where applicable.

Note: Unless otherwise listed, April is the starting month for all advertising.

VII TRAVEL INFORMATION SERVICES.

1. OPERATE A YEAR ROUND TRAVEL INFORMATION PROGRAM THAT IS RESPONSIVE, TIMELY, EASILY ACCESSIBLE, AND SALES-ORIENTED.
   - Operate travel information centres at seven primary and approximately five secondary locations, plus a mobile centre.
   - Extend operating season at Emerson centre on a pilot basis.
   - Construct new information facilities at Winnipeg East. Investigate potential on Highway 16.
   - Conduct sales-oriented training program for in-house counsellors; conduct outreach training for community travel counsellor staff.
   - Provide a currency exchange service at Emerson on a test basis.
   - Provide toll-free telephone service at Legislative Building centre.
   - Initiate computer data base information system.
2. OPERATE A TRANSIENT ACCOMMODATION QUALITY ASSURANCE PROGRAM THAT IS EQUITABLE, UNDERSTOOD BY THE INDUSTRY, AND THAT IS BOTH FAIR AND FIRM.
   - Complete inspections and star ratings of transient accommodations.
   - Minimum of one inspection per year.
   - More frequent inspections as necessary for selected operations.
   - Develop and implement a procedure to operationalize new regulations.
   - Investigate and handle public complaints.
3. OPERATE A PROGRAM OF CONSUMER SUPPORT THAT IS TIMELY AND RESPONSIVE TO MARKETING THRUSTS.
   - Respond to consumer enquiries for travel information.
   - Upgrade computer support system.
   - Deliver a Master Angler awards and information program.
   - Computerize the Master Angler program.

VIII DEVELOPMENT STRATEGY 1984/85.

To direct development and upgrading to meet specific market expectations related to dominant resource themes by region with primary development activity concentrated on identified destination areas.

1. TOURISM ATTRACTIONS/EVENTS DEVELOPMENT AND UPGRADING.
   - Identify and communicate development opportunities to potential community, non-profit, private and public organizations through the use of development prospectuses, public forums and other means of communication.
   - Provide advisory counselling and assistance to potential and existing developers on a priorized basis according to degree of contribution of project to strategic objectives identified in the marketing plan.
   - Advocate tourism industry interests directly and on behalf of tourism operators with related government departments including Natural Resources (Fisheries/Wildlife/Parks), Cultural Affairs, and other regulatory agencies.
   - Promote availability of Capital Incentives and other assistance programs and provide assistance in preparation of proposals for funding consistent with development strategic priorities.
   - Expand communication links with federal agencies responsible for implementation of federal programs capable of assisting tourism development and negotiate provincial tourism interests in federal program emphasis (e.g. I.R.D.P., Federal Business Development Bank, Native Economic Development Fund, etc.)

   DEVELOP AND UPGRADE TOURISM ACCOMMODATION FACILITIES.
   - Identify and communicate development opportunities to potential private, non-profit and public organizations through the use of development prospectuses, public forums and other means.
   - Provide advisory counselling to existing and new accommodation developers with primary emphasis on the development of facilities catering to specialty markets and destination areas.
   - Promote availability of Capital Incentives and other assistance programs and provide assistance in preparation of proposals for funding.
   - Expand communications links with federal agencies responsible for implementation of federal programs capable of assisting tourism development and negotiate provincial tourism interest in federal program emphasis.
   - Develop and utilize new licensing guidelines to ensure smooth transition and optimum tourist benefits in implementation of new regulations.

2. HUMAN RESOURCE DEVELOPMENT AND UPGRADING.
   - Identify and communicate program and funding opportunities of government and related agencies capable of upgrading and training skilled tourism employees.
   - Provide advisory counselling to industry sectors and tourism operators in the areas of manpower utilization and training requirements.

— Develop training programs (e.g. seminars/manuals) designed specifically to the tourism industry, through utilization of recommendations of Manpower Needs Study.

3. INDUSTRY ORGANIZATION DEVELOPMENT.
— Provide advisory counselling and assistance to industry organizations in organizational development, training, marketing and planning.
— Encourage and assist in the development of industry organizations as an avenue for communicating and delivering industry programs and receiving industry feedback.

4. INDUSTRY LIAISON AND COMMUNICATION.
— Initiate and support the development of regional and community groups for the initiation, planning and implementation of tourism projects.
— Expand our relationship with industry and organizations that have the potential to initiate and develop tourism projects including local government districts, chambers of commerce, regional development corporations, community development corporations, service clubs, private corporations, and other related organizations.

IX COMMUNICATIONS

1. MANITOBA PUBLIC.
— Design a tourism industry awareness program that:
  — Positions the tourism industry positively;
  — Positions Travel Manitoba positively;
  — Encourages hospitality.
— Organize delivery of awareness program through the Tourism Industry Association of Manitoba.

2. TOURISM INDUSTRY.
— Establish a regular schedule of meetings with regional/sectoral industry organizations to review annual performance, receive input to marketing plan, review draft plan, and communicate final marketing plan.
— Attend regional association annual meetings and sectoral association annual meetings.
— Encourage complementary regional theming in provincial and regional association literature and promotions.
- Participate in development of a departmental newsletter.

3. TOURISM RELATED ORGANIZATIONS.
— Expand relationships with organizations with potential to initiate tourism projects:
  — Municipal corporations;
  — Chambers of Commerce;
  — Community Development Corps.
  — Service Clubs;
  through selected meetings, seminars and planning committees.
— Respond to priority speaking requests.

4. PROVINCIAL DEPARTMENTS.
— Maintain a tourism/cultural affairs/historic resources development and program review committee structure and a joint tourism/parks strategy, development and implementation structure.
— Utilize the Licensing Advisory Committee to maintain close working relations with Crown Lands, Environment, Labour, Natural Resources on tourism regulatory and development matters.
— Maintain communications with Highways and Transportation on transport related matters; Labour and Manpower on training related matters; and Northern Affairs on northern tourism matters.

5. FEDERAL DEPARTMENTS/ OTHER PROVINCES.
— Participate in Tourism Canada — provincial marketing strategy development, C.C.T.O., Travel Film Committee, Tourism Research Committee, National Advisory Committee, and Minister's Conference.
— Maintain liaison on tourism matters with appropriate federal departments.